

How to Create a Statistics by Staff—Closed Invoices Report

This report shows the sales activity or production for each staff member. The bottom of the report shows a grand total for all staff members together. This report is available as an End of Day[†], End of Month, and End of Year Report.

Fields included for each staff member

This report organizes information under two major headers:

- **Quantity** has two columns: Number and % of Total.
- **Sales** has three columns: Amount, % of Total, and Average.

Information about the following is listed under each column:

- Invoices
- Patients
- Service sales
- Inventory sales

Note: Because this report has no filtering options, the report is automatically sorted by staff ID.

Preview

Statistics By Staff Report					
Monthly - Closed Invoices - By Staff Last Name					
Thursday, Date 1 01:39 pm through Thursday, Date 2 10:51 am					
Quantity			Sales		
Number	% of Total		Amount	% of Total	Average
Staff ID: IVH IDEXX Veterinary Hospital					
Invoices	1.00	20.00%	\$36.80	4.23%	\$36.80
Patients	2.00		\$36.80		\$18.40
Serv. Sales	2.00	14.29%	\$27.30	3.17%	\$13.65
Inventory	1.00	100.00%	\$9.50	100.00%	\$9.50
Staff ID: 1 Fred Jones, DVM					
Invoices	1.00	20.00%	\$200.00	22.97%	\$200.00
Patients	2.00		\$200.00		\$100.00
Serv. Sales	2.00	14.29%	\$200.00	23.22%	\$100.00
Inventory	0.00	0.00%	\$0.00	0.00%	\$0.00
Staff ID: 22 John Kingley, DVM					
Invoices	1.00	20.00%	\$72.50	8.33%	\$72.50
Patients	1.00		\$72.50		\$72.50
Serv. Sales	1.00	7.14%	\$72.50	8.42%	\$72.50
Inventory	0.00	0.00%	\$0.00	0.00%	\$0.00
Staff ID: 14 C Schulze, DVM					
Invoices	2.00	40.00%	\$561.50	64.48%	\$280.75
Patients	3.00		\$561.50		\$187.17
Serv. Sales	9.00	64.29%	\$561.50	65.19%	\$62.39
Inventory	0.00	0.00%	\$0.00	0.00%	\$0.00
Total For All Staff					
Quantity			Sales		
Number	% of Total		Amount	% of Total	Average
Invoices	5.00	100.00%	\$870.80	100.00%	\$174.16
Serv. Sales	14.00	100.00%	\$861.30	100.00%	\$61.52
Inventory	1.00	100.00%	\$9.50	100.00%	\$9.50

Note: These numbers may not be whole numbers if more than one staff member is entered on an invoice. For example, if there are two staff IDs on an invoice, each staff member gets credit for .5 invoices.

[†] The End of Day report is not available for the current period; you must run it for a closed period only.

Create the report

1. On the menu bar, select **Reports > End Of Period > End Of Month, End Of Day, or End Of Year.**
2. Select **Statistics By Staff Report—Closed Invoices.**
3. In the periods area at the top of the window, click the closing period(s) for which you want to run this report.

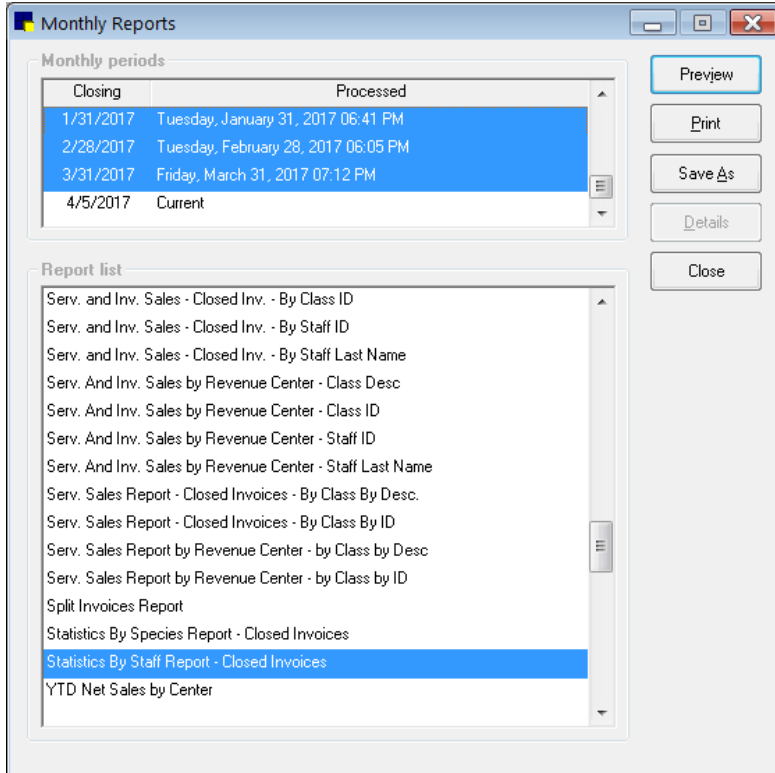
Note: The End of Day report is not available for the current period; you must run it for a **closed** period only.

You can run the report for multiple closed periods together by doing the following:

- a) Select the period that begins the range you want.
- b) Hold down the SHIFT key while you click the period that ends the range you want.

This selects the beginning and ending periods and everything between. When you run the report, the data represents all selected periods together.

4. Click **Preview.**



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